

California State University San Marcos

Administrative Policy Guidelines

GENERAL INFORMATION:

- All divisions on campus should follow these guidelines for Administrative (non-Academic Senate) policies.
- The Office of the Vice President for Finance and Administrative Services (VPFAS) maintains the repository and facilitates the process for all administrative campus policies.

DEFINITIONS:

- **Policy** is defined as a high-level governing framework establishing the general goals and acceptable procedures of the institution, a statement that guides behavior and sets general parameters related to how business is conducted. Policy is not intended to communicate operating procedures unless legally required.
- **Guidelines/Operating Procedures** are documents that advise how a process should be completed.
- **Desktop Procedures** are documents maintained by departments and individuals regarding internal processes and not part of the campus policy and procedure repository.

POLICY PROCESSES:	
New	Developing a new campus policy
Revision	Making significant substantive changes that change or augment the original meaning, instruction or directive of the policy
Update	Making minor non-substantive changes to a current campus policy such as title changes, spelling and grammar updates, Executive Order updates and similar immaterial changes.
Rescission	Removing a policy because it is no longer applicable to the campus

POLICY TEMPLATE:

- The policy template can be found on the Policy website:
<http://www.csusm.edu/policies/>

FOR POLICY ASSISTANCE:

- Contact the Office of the Vice President, Finance and Administrative Services
vpfas@csusm.edu
760-750-4950

California State University San Marcos Administrative Policy Guidelines

New: Developing a new campus policy

Revision: Marking significant substantive changes that change or augment the original meaning, instruction or directive of the policy

STEP:	RESPONSIBLE PARTY:	ACTION:
1	Initiator	Identifies the need to create a new policy or revise an existing policy and requests approval from the appropriate PAT Member.
2	PAT Member	Authorizes request to proceed in drafting the policy.
3	Initiator	Consults with the Office of the VPFAS Policy Administrator to discuss policy impact and next steps.
4	Initiator	Drafts the policy (utilizing the Administrative policy template), consulting with the appropriate stakeholders (including PAT Member) and sends the final draft to the VPFAS Policy Administrator Emails policy to Policy Administrator, cc'ing PAT Member, indicating PAT Member approval of the policy and stakeholder input.
5	Policy Administrator	Consults with the Office of Human Resources regarding union notice.
		If the policy impacts students, the Vice President for Student Affairs shall be consulted to determine who to include in the review process.
6	PAT Member	Distributes the policy to the President's Administrative Team (PAT) for review using Adobe Sign. CC's Policy Administrator.
		<i>Provides a two-week review period for review and feedback.</i>
7	PAT Members	Reviews and provides feedback. PAT may review and/or forward to additional stakeholder/designees.
8	Policy Administrator and Initiator	If applicable, reviews feedback and make necessary adjustments. A follow-up PAT review may be required if material revisions are required.
9	Policy Administrator	IF APPROVED , when applicable, forwards the approved policy to the Office of Human Resources to forward onto the OGC and the CSU Office of Labor Relations.
		IF NOT APPROVED , notifies the initiator and discusses next steps
10	Office of Human Resources	If applicable, notifies the Policy Administrator after the meet and confer process of the result.
11	VPFAS	IF APPROVED , Posts the policy on the website and communicates through campus communications and targeted communication, as necessary.
12	VPFAS	Announces the new or revised policy to the campus via campus wide announcements email.

California State University San Marcos Administrative Policy Guidelines

Updating: Making minor non-substantive changes to a current campus policy such as title changes, spelling and grammar updates, Executive Order updates and similar immaterial changes.

STEP:	RESPONSIBLE PARTY:	ACTION:
1	Initiator	Identifies the need to update a policy and requests approval from the appropriate PAT Member.
2	Initiator	Consults with the VPFAS Policy Administrator to confirm updates meet the "updating policy" definition, discuss policy impact and next steps.
3	Initiator	Forward the electronic final draft to the VPFAS Policy Administrator.
4	Policy Administrator	Consults with the Office of Human Resources regarding union notice.
5	VPFAS	Post the policy on the website.
6	VPFAS	Announces the updated policy to the campus via the Policy Updates website.

Rescission: Removing a policy because it is no longer applicable to the campus

STEP:	RESPONSIBLE PARTY:	ACTION:
1	Initiator	Identifies the need to rescind a policy and requests approval from the appropriate PAT Member.
2	PAT Member	Authorizes request to proceed in consulting with the appropriate stakeholders (including PAT Member) and sends the final request to the VPFAS Policy Administrator.
3	Initiator	Consults with the Office of the VPFAS Policy Administrator to discuss policy impact and next steps.
4	Policy Administrator	Works with initiator to complete the Policy Rescission Template
5	Policy Administrator	Consults with Office of Human Resources regarding union notice
6	Policy Administrator	Distributes the policy to the PAT for review utilizing Adobe Sign <i>Provides a two-week review period for review and feedback</i>
7	PAT Members	Reviews and provides feedback. PAT may review and/or forward to additional stakeholder/designees.
8	Policy Administrator and Initiator	If applicable, reviews feedback and make necessary adjustments. A follow-up PAT review may be required if material revisions are required.
9	VPFAS	Removes the policy from the website and communicates through campus communications and targeted communication, as necessary.
10	Policy Administrator	IF NOT APPROVED , notifies the initiator, and discusses the next steps.